BASE ORDER 5050.3H

From: Commanding General
To: Distribution List

Subj: REPORTING OF MEETINGS/CONFERENCES, TRIPS, AND VISITORS

Ref: (a) BO 1301.15B
(b) BO 4200.4D

Encl: (1) Format for Memorandum Report of Trips and Meetings
(2) Format for TAD/Trip Report

1. Purpose. To provide procedural guidance relative, to the reporting of meetings/conferences/trips and/or visits by personnel representing MCLB, Albany.

2. Cancellation. BO 5050.3g.

3. Information. To ensure that the policies and procedures of MCLB, Albany, are compatible and responsive to matters subject to discussion by representatives of MCLB, Albany, the results of all conferences and official visits must be fully documented. In addition, information regarding these conferences, meetings, and visits prior to the actual occurrence is helpful in scheduling of personnel/facilities and the control of funds.

4. Action

a. Reporting of Scheduled Meetings/Conferences/Trips and/or Visits. All Divisions, Staff Offices, and Headquarters Battalion will submit a weekly memorandum report of forthcoming events using the format outlined in enclosure (1).

(1) These Memorandum Reports of Trips and Meetings will be submitted no later than 0900 on Thursday of each week.

(2) These reports will be submitted as indicated in enclosure (1) by Logistic Center divisions to the Deputy Commander (Code 803), for consolidation and submission to the Commanding General. Logistic Center divisions that have word processing systems linked to the word processing system in the Office of the Deputy Commander (Code 803) will submit their report electronically to

ODC:D5;803. A boilerplate format "FORMAT" is available in ODC:D5;803 and should be used by organizations submitting their report electronically. All other Divisions, Staff Offices, and Headquarters Battalion will submit Memorandum Reports of Trips and Meetings to the Commanding General (Code 110) with a copy to the Deputy Commander (Code 803).

(3) Negative reports are required.

b. Reports on Trips/Meetings/Conferences/visits. On all occasions when individuals represent MCLB, Albany, on official business with representatives of other commands or with industry, a report is required. When there are representatives involved from more than one division/office and/or a group of individuals from the same division/office, a pre-trip meeting should be held and a group leader designated as the spokesperson who will also be responsible for preparing a consolidated report. Normally, that spokesperson will be selected from the division/office having primary cognizance over the subject matter of the meeting/conference. The following are examples:

(1) Conferences/meetings pertinent to budgetary and fiscal programs will be the responsibility of the Comptroller Division.

(2) Conferences/meetings pertaining to Base construction will be the responsibility of Facilities and Services Division.

(3) Conferences/meetings pertaining to the provisioning process of new equipment being introduced to the Fleet Marine Force (FMF), Logistics Support Analysis (LSA) conferences, or conferences/meetings dealing with supply will be the responsibility of the Weapon System/Equipment Management (WS/EM) Directorate. Responsibility for coordinating attendees is assigned to the WS/EM Directorate.

c. Reporting Method. Reports will be presented/prepared in one of the following formats:

(1) Oral. Oral reports will be provided to the Division Director, within five working days after completion of the trip/conference or upon return to MCLB, Albany, for routine trips whose purpose is information exchange or training (e.g., in-progress reviews, school, or seminars).

(2) Memorandum for the Record. A memorandum for the record will be prepared for mission-related, routine trips and provided to the Division Director/Principal Director within five working days after completion of the

trip/conference or upon return to MCLB,
Albany. These include trips such as provisioning conferences, technical manual reviews, data calls, etc. However, if such meetings identify actions that impact the Command or necessitate response from another Division, a TAD/Trip Report will be prepared as described below.

(3) <u>TAD/Trip Report</u>. Trip Reports will be prepared and submitted to Commanding General (Code 801 or 110 as applicable) within seven working days after completion of the trip/conference or upon return to MCLB, Albany. Extraneous backup material should not be forwarded as enclosures. Only that material deemed appropriate for higher-level review should be included. TAD/Trip Reports will be prepared, in the format provided as enclosure (2), for those trips that have Command-level interest. This will include meetings that impose action on the Command by other commands, policy guidance conferences, trips that necessitate action from another Division (as described in paragraph 4c(2) above), and liaison trips that address and/or result in questions (that require a response) concerning the Logistics Center's support functions or procedures. Topics considered to be of Command-level interest include but are not limited to:

(a) Increases or decreases in personnel;
(b) Funding, as it affects MCLB, Albany, in general;

(c) Health or safety of personnel;

(d) Security of MCLB, Albany;

(e) Mission capability - increase, decrease, or inability to carry out;

(f) Policy matters;

(g) Major construction projects;

(h) Equipments known to be of special interest to MCLB, Albany, or higher authority;

(i) Commitments to attend future meetings or to provide substantive information in the future; and

(j) Reduction or withdrawal of participation by MCLB, Albany, from continuing projects or other efforts.

d. The report will be denoted as a Trip Report when the Albany representatives have traveled off Base. The report will be denoted a Conference Report when the meeting is held at MCLB, Albany. Where cognizance is not clear or overlapping of cognizance is evident, responsibility for writing the official report will be resolved by the conferees before concluding the conference. On occasion, assignment of report responsibility will be designated by the Commanding General, Deputy Commander, or Chief of Staff for Base Operations regardless of primary cognizance and should be accomplished accordingly.

(1) All divisions/offices participating in the conference/meeting and those with an interest in the subject matter will be placed on distribution for the report.

(2) When a trip or conference report recommends actions by other divisions/offices, these recommendations should be forwarded, via memorandum, to the Divisions being tasked. Information in the memorandum should include Trip (what, when, and where), Drafter (name, code, and telephone extension), and for each action topic, Discussion, Recommended Action, and Comments. The Deputy Commander (Code 801) should be a Copy to addressee on all memorandums assigning action to Logistic Center organizations.

e. An effective follow-up program will be maintained within Division/Staff Offices to assure that required actions identified on reports are accomplished.

f. Reference (a) provides information relative to providing copies of trip reports when subject matter falls within the cognizance of Command Liaison Personnel.

g. Reference (b) relates to agreements made with contractors at the conference regarding actions to be taken. Concurrence by all parties should be attested to by mutual signature before departing the conference. Copies of these agreements should then be made an enclosure to the conference report, and a copy of the report provided to the Director, Contracts Division (Code 900).
5. <u>External Distribution</u>. Copies of a trip report may be released to CMC or other commands at the discretion of the Division Director. Copies will be released, as an enclosure, with a cover letter signed by the appropriate Division Director. At the discretion of the Division Director, and upon completion of actions outlined in paragraph 4g above, copies of trip reports may be released to private industry under cover letter. Provide info copy of cover letters to Deputy Commander (Code 801). Maximum utilization of electronic mail is encouraged.

6. <u>Summary of Revision</u>. This Order contains a substantial number of changes and should be thoroughly reviewed.

[signed]
THOMAS P. ANGUS
Chief of Staff

DISTRIBUTION: E
BO 5050.3G Ch 1
803:tgt
11 Jun 1986

BASE ORDER 5050.3G Ch 1

From: Commanding General
To: Distribution List

Subj: Reporting of Meeting/Conferences, Trips, and Visitors

1. <u>Purpose</u>. To direct a pen change to the basic Order.

2. <u>Action</u>. On page 2 of enclosure (1) at **NOTE <u>2</u>/, add the following:

MILITARY: Abbreviated rank, first initial, last name (location code)
CIVILIAN: First initial, last name (location code)

THOMAS P. ANGUS
Chief of Staff

DISTRIBUTION: E

Format for Memorandum Report of Trips and Meetings

5050
Orig code

MEMORANDUM

From:
To: *See note <u>1</u>/ below

Subj: REPORT OF MEETINGS, TRIPS, AND VISITS

Ref: (a) BO 5050.3G

1. The following is provided in accordance with the reference for the week of
_____.

a. Trips to commence during reporting period:

(1) <u>Traveler</u>: **See note <u>2</u>/
<u>Purpose</u>:
<u>Location</u>:
<u>Dates</u>:

b. Conference/Meetings aboard Base during reporting period:

(1) <u>Subject</u>:
<u>Location</u>: On-base location. Include building number,
conference room number etc.
<u>Dates</u>:
<u>Attendees</u>: Name (see note <u>2</u>/), organization coming
from

c. Visitors not otherwise noted:

(1) <u>Name</u>: See note <u>2</u>/, organization coming from
<u>Office</u>: Being visited
<u>Dates</u>:
<u>Purpose</u>:

d. Leave scheduled for Division Directors during reporting period:

(1) <u>Name/Organization</u>:
<u>Dates</u>:

SIGNATURE

Copy to:
See note <u>1</u>/

*NOTE <u>1</u>/ Memos originating within the Weapon System/Equipment

Management Directorate, Technical Support, Contracts, Repair, and Materiel Divisions, and Competition Advocate and small and Disadvantaged Business utilization Offices will be forwarded to the Deputy Commander (Code 803). Like reports of the same information will be provided by other Base divisions, Headquarters Battalion, and other offices to the Commanding General (Code 110) with a copy to the Deputy Commander (Code 803). Use only applicable subparagraphs. Negative entries are not required.

**NOTE 2/ In all cases when identifying personnel, utilize the following format(s):

MILITARY: Abbreviated rank, first initial, last name (location code)
CIVILIAN: First initial, last name (location code)

For visitors, utilize the same format, including the grade (when known) of civilian visitors:

First initial, last name (Grade)

Format for TAD/Trip Report

<div align="right">

5050/1
Orig code

</div>

MEMORANDUM

From: Name, Grade/Rank, Billet/Title
To: Commanding General (* See note below)
via: (1) Branch Head
(2) Division Director/Commanding Officer, Headquarters Battalion

Subj: TRIP REPORT

Ref: (a) BO 5050.3G

1. General

a. Trip: (what, when, and where)

b. Purpose: (Brief outline of the purpose of the trip)

c. Brief Summary: (Brief description of trip results and accomplishments)

2. Detailed Report

a. Topic:

(1) Discussion:

(2) Recommended Action:

(3) Action Office:

(4) Comments:

b. Topic:

(Continue Topic Numbers as required.)

3. Miscellaneous

a. Indicate names of participants, their organization code and telephone number when continued liaison on matters reported is anticipated.

b. Indicate information obtained which may be of general interest to MCLB, Albany, but which is not directly related to matters reported in paragraph 2 above.

SIGNATURE

*Note: Reports originating within the Logistics Center will be addressed to the Commanding General (Code 801). Reports from other Base divisions, Headquarters Battalion, and other offices will be addressed to the Commanding General (Code 110) with a copy to the Deputy Commander (Code 8Ol). The listed format is a sample to be used as a guide. Utilization of the proper chain of command is warranted. Utilize only applicable subparagraphs.

ENCLOSURE (2)